Stock Transfer Instructions

Introduction

Please inform the Philanthropy department at Native Plant Trust each time you intend to make a donation of stock to us. Frequently a transfer between brokers occurs with insufficient information to correctly identify you as the donor. The following instructions will greatly help to ensure you receive full credit for your generous contribution. Thank you.

Information needed by Native Plant Trust

Your name
The type of stock and quantity – e.g. 42 shares of IBM
The stock transfer date (or intended transfer date)
How you want the donation to be used (the designation) – e.g. to support the conservation dept.
Is this donation a payment toward a pledge?
Is this donation anonymous?
Your agent’s name, contact details, and brokerage firm (not essential but very helpful)

Information needed by your broker

DTC Number: 0062
For the Benefit of: Native Plant Trust, Inc. Brokerage Account
Vanguard brokerage account number: 56363408

Contact information

Philanthropy Department
Native Plant Trust
321 Commonwealth Road, Ste. 204
Wayland, MA 01778
774-519-5571
gifts@NativePlantTrust.org